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June 27, 2003

By Hand Delivery

Ms. Marlene Dortch
Secretary
Federal Communications Commission
445 12th Street, SW
Room TW-A325
Washington, D.C. 20554

RECEIVED

JUN 27 2003

FEDERAL COMMUNICATIONS COMMISSION
OFFICE OF THE SECRETARY

Re: ***Ex Parte Presentation – MB Docket No. 02-235***

Dear Ms. Dortch:

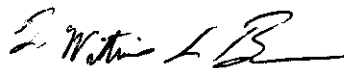
In accordance with Section 1.1206 of the Commission's Rules, 47 C.F.R. §1.1206, Telemundo Communications Group, Inc., submits this letter to report that on June 25, 2003, Ibra Morales, President of the Telemundo Station Group, Steve Mandala, Telemundo's Executive Vice President of Sales, Maria Rodriguez, Telemundo Business Development, Robert Okun, Vice President of Governmental Affairs, and Bill LeBeau, Telemundo's Senior Regulatory Counsel (collectively, "Telemundo Representatives") met with Commissioner Kathleen Abernathy and her media legal adviser, Stacy Robinson, and with Commissioner Kevin Martin and his media legal adviser, Catherine Bohigian. Also, on June 27, 2003, the Telemundo representatives, except Robert Okun, met with Commissioner Jonathan Adelstein and his media legal adviser, Johanna Mikes, and Media Bureau Chief Ken Ferree and David Brown. The parties discussed whether Spanish-language media should be a distinct subject of Commission review in the context of this proceeding, and the context and likely effects of the proposed Univision-Hispanic Broadcasting merger. The parties also provided the attached presentation.

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LISTA B C D E

The Secretary
June 27, 2003
Page 2

An original and one copy of this *ex parte* letter are being filed with the Secretary's Office as required by Section 1.1206(b)(2) of the Commission's Rules. Please contact the undersigned if there are any questions with respect to this submission.

Very truly yours,

A handwritten signature in black ink, appearing to read 'F. William LeBeau', with a stylized flourish at the end.

F. William LeBeau

Attachments

cc: ITS
Commissioner Kathleen Abernathy*
Commissioner Kevin Martin*
Commissioner Jonathan Adelstein*
Kenneth Ferree, Media Bureau Chief*
Stacy Robinson, Media Legal Adviser to Commissioner Abernathy*
Catherine Bohigian, Media Legal Adviser to Commissioner Martin*
David Brown, Media Bureau*

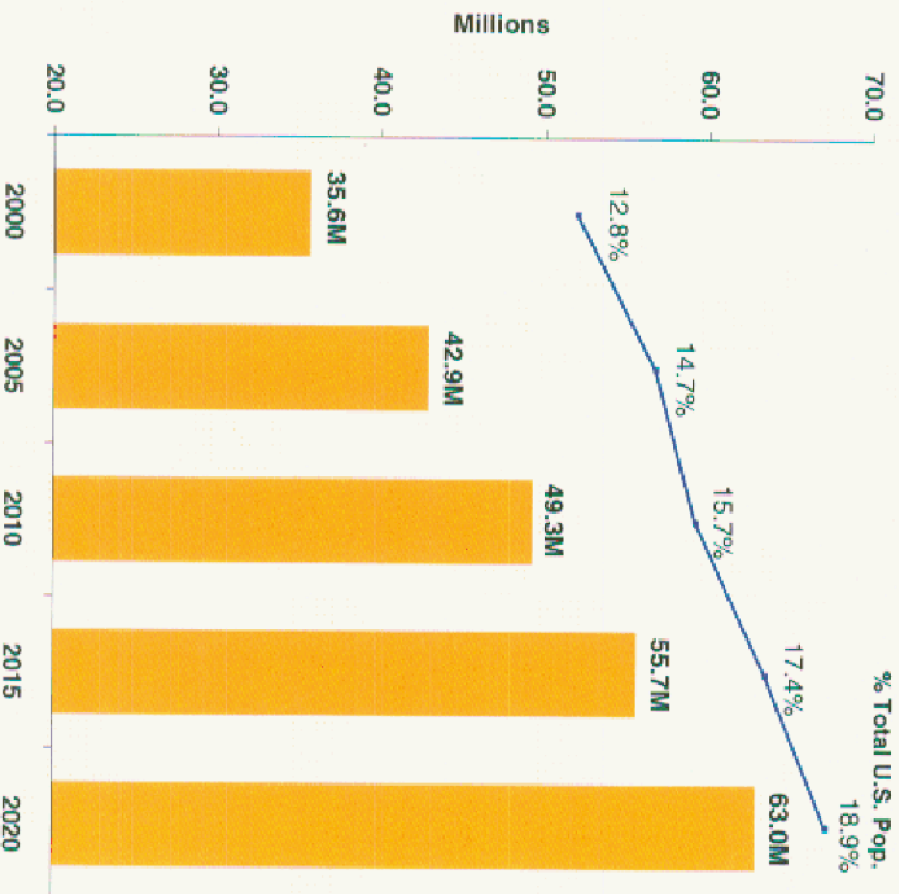
* w/o attachments

HBC / Univision Merger Facts

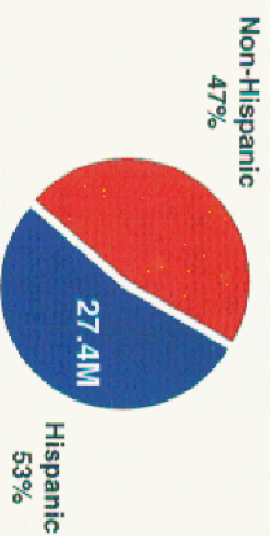
June 2003

Hispanic Context - Population Growth & Language

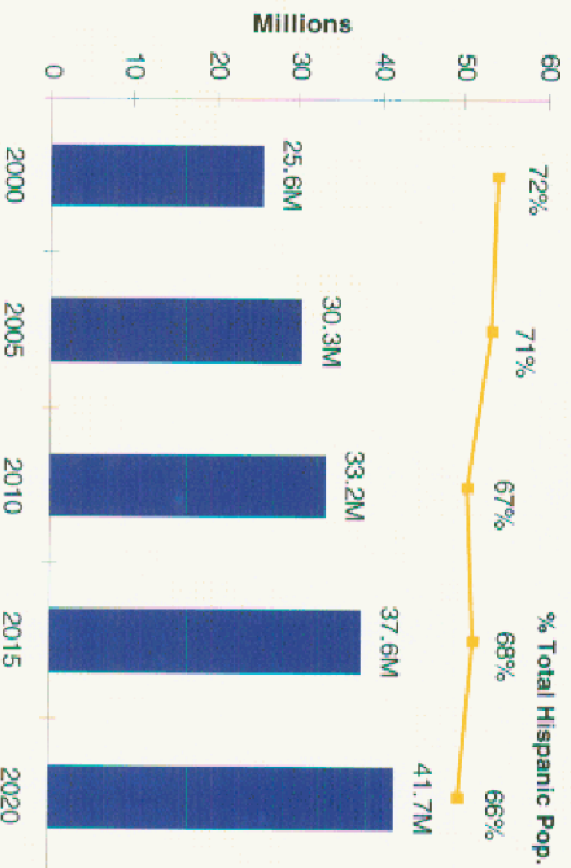
Hispanic Population



Share Of Population Growth '00-'20



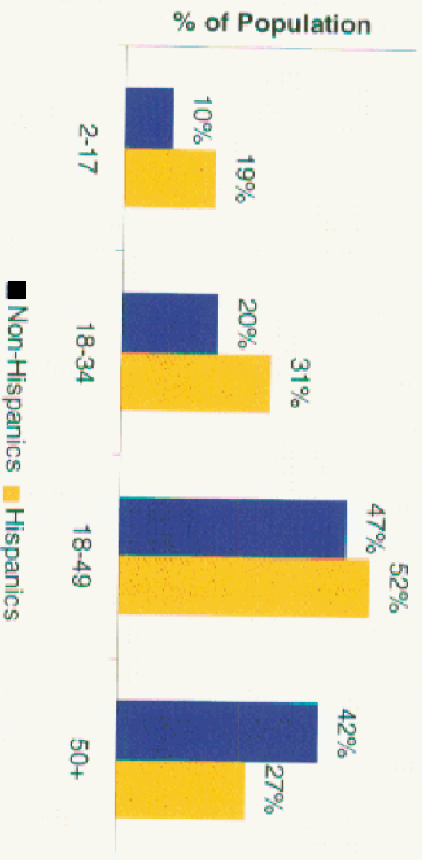
Spanish Spoken At Home Among Hispanics



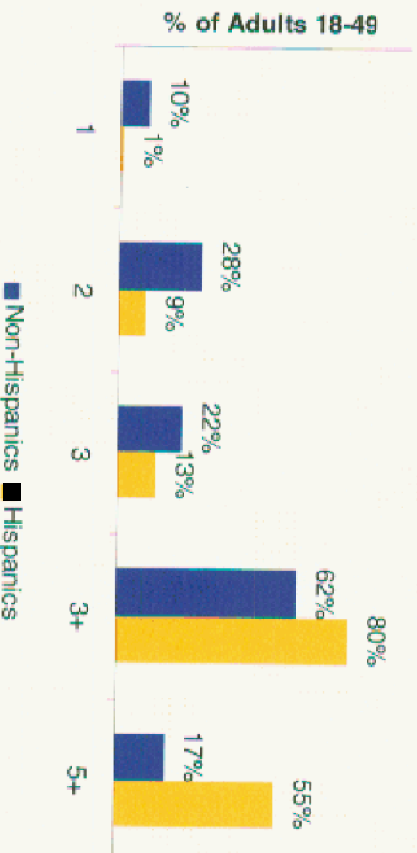
Nearly 50MM Hispanics In U.S. By 2010... Spanish Language Very Important... ~70% Speak Spanish At Home

Hispanic Context - Age, Education, Viewing Habits...

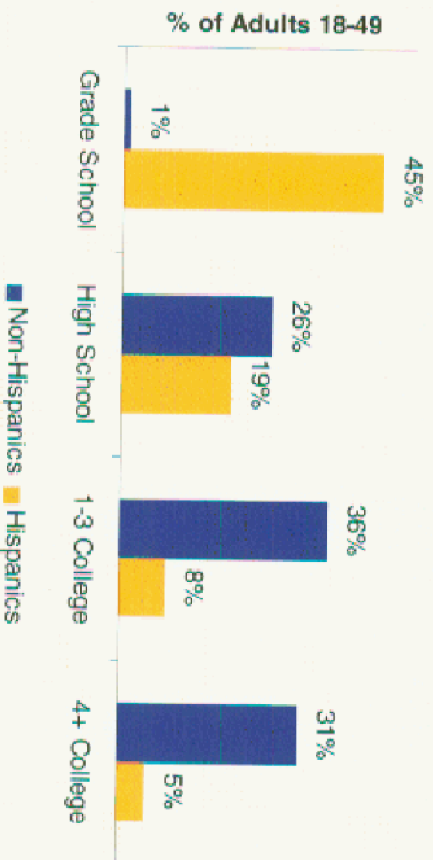
Age Distribution



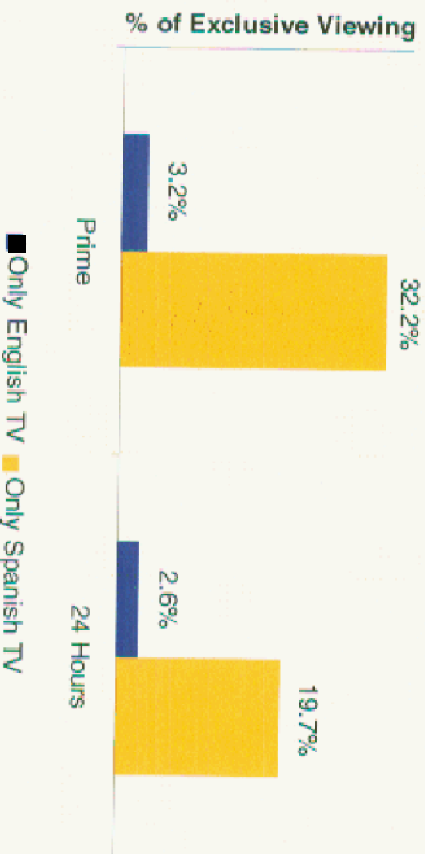
Persons Per Household



Education



TV Viewing Habits For Spanish Dominant



Language Not Only Differentiating Factor... Age, Education, Household Size & TV Viewing Habits... Demonstrate Distinct Nature Of Hispanic Market

Hispanic Context - Media Usage & Options

- Hispanic Media Usage Differs Substantially from English Language

- Watch TV More...
- Listen To Radio More...
- Read Newspapers Less...
- Use Internet Less...

US Hispanic's Media Usage vs General Population			
	US Hispanics	General Population	Difference
Watch TV	99%	96%	3%
Listen to Radio	92%	83%	11%
Read Newspapers	69%	83%	-17%
Use Internet	41%	67%	-40%

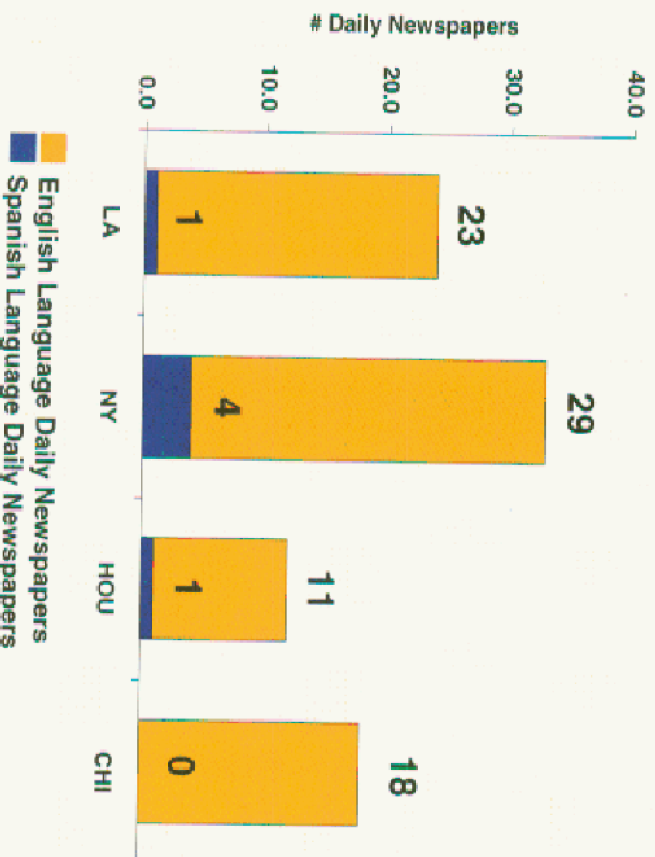
- Limited Spanish-language Media Options vs. English-language
 - Only 2 National TV Voices
 - No Daily Spanish-language Newspaper in 14 of top 20 Hispanic Markets
 - One or Fewer Spanish-language Newspapers in 3 of top 5 Hispanic Markets
 - Fewer Local Spanish-Language Radio Options: 7 vs 30 in NY, 9 vs 28 in LA, 6 vs 42 in Chicago

Limited Spanish-Language Media Options... Heavy Reliance On TV & Radio

Hispanic Context: Newspaper Example

Daily Spanish-Language
Newspapers vs. English-Language

Los Angeles Example



English Language

Top 10 LA Daily Newspapers Circulation 2,406,801

LA Households

5,434,500

Top 10 LA Newspapers Penetration

44%

Spanish Language

Sole LA Daily Spanish Newspaper Circulation

128,494

LA Hispanic Households

1,573,400

Spanish-language Newspaper Penetration

8%

Largest Spanish-Language Newspaper In US "La Opinion" Reaches Only 8% Of LA's Hispanics... Spanish Print Is Less Viable Media Option

Impact on Competition: UVN/HBC Market Share



UVN/HBC Will Capture Over 70% Of Local Ad Dollars In 4 Of Top 9 Hispanic Markets And Over 50% In 8 Of 9 Top Markets

Impact on Diversity: Phoenix Case Study

- **1MM Hispanics (3% of US total) principally served by 1 TV voice**
 - Univision owns only full power Spanish-language TV station covering Phoenix
 - Little choice for viewers or advertisers
- **Phoenix Hispanics depend heavily on free over-the-air TV**
 - Only 24% of Phoenix Spanish-speakers subscribe to cable... Few can receive low power TV signals
 - No other full power stations available at feasible pricing
- **No Daily Spanish-Language Newspaper**
- **Combination Of #1 Spanish-Language TV & Radio Stations In Phoenix... Leads To Significant Concentration**
 - With HBC, Univision gains 5 Spanish radio stations in market
 - UVN Already 92% Of Prime Time TV Audience... Will add #1 Spanish Language Radio Station In Market
 - HBC-UVN Combined Will Control 76% Of Spanish TV & Radio Ad \$ In Phoenix

Phoenix Market Illustrates High Degree Of Viewer and Advertising Concentration In Major Hispanic Markets